

OREGON CHRISTMAS TREE SURVEY - 2001



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Survey highlights: Oregon's Christmas tree total gross value of sales for 2001 was \$98.2 million. Growers who have at least 100 acres of trees account for 81 percent of all the sales. Oregon sold over 6.1 million trees throughout the United States and the world, with California being the most popular destination. The average price received by growers was \$16.06 and the number of acres growing trees was 50,970. There were 9,166 full and part-time workers in the industry with an annual payroll of \$24.6 million dollars.



Douglas Fir trees were the most popular tree sold, accounting for 57 percent of all trees sold. The average price that growers received for Douglas Fir trees was \$12.35, while the highest price received for any tree was \$24.11 for the Nordmann Fir. However, only 9,000 Nordmann Fir trees were reported sold last year. The number two ranked tree in terms of number sold, the Noble Fir, accounted for 35 percent of the total trees sold, but 49 percent of the total sales value. This compares with the Douglas Fir, which accounted for 44 percent of the sales.

Clackamas County is the biggest grower of Christmas trees in Oregon, accounting for \$32.4 million in sales from 15,200 acres. The second, third, and fourth ranked counties in terms of total sales are Benton, Marion, and Polk. These top four counties account for 87 percent of all the sales in Oregon, while growing 75 percent of the total acres.

California receives 46 percent of all the Christmas trees grown in Oregon. Other close markets are local sales in Oregon, Washington, Canada, and other Western States, which when combined receive 26 percent of the total trees. Mexico is the recipient of 9 percent of the trees, with Douglas Fir trees being the predominant specie. Sales to States east of the Mississippi River account for 19 percent of the total sales.

Planting of trees for future production shows that in the upcoming 5-6 years, the number of trees that will reach market size could exceed current market sales by 3 to 4 million trees each year. This points to the increasing importance of market analysis, promotion, and sales efforts in the future. The total of all trees reported to be growing at the present time is 54.3 million trees.

The number of full and part-time workers employed in the Christmas tree industry in Oregon is significant, with over nine thousand workers engaged in the growing and harvesting of Christmas trees. The total wages paid to workers was \$24,590,000 dollars, and the average annual wages per worker was \$2,683 dollars.

Table 1: 2001 Oregon Christmas tree production, sales, workers, wages, and average price per tree

	TOTAL	Size of operation				
		1-14 Acres	15-29 Acres	30-49 Acres	50-99 Acres	100+ Acres
Sales Value (000)	98,243	6,800	2,853	4,139	5,170	79,281
Number of Trees Sold (000)	6,119	532	232	273	372	4,710
Average Price per Tree (\$)	16.06	12.78	12.30	15.16	13.90	16.83
Acres Growing Trees	50,970	6,344	2,412	2,948	3,439	35,827
Number Workers	9,166	2,520	655	704	892	4,395
Wages \$ (000)	24,590	1,896	655	1,096	1,890	19,053

Table 2: Trees sold by specie, value of sales, average price and sales by size of operation

				Sales by acres in operation				
Specie	Number of trees sold	Total sales	Average price	1-14	15-29	30-49	50-99	100 & over
	<i>Number (000)</i>	<i>Dollars (000)</i>	<i>Dollars per tree</i>	<i>Dollars (000)</i>	<i>Dollars (000)</i>	<i>Dollars (000)</i>	<i>Dollars (000)</i>	<i>Dollars (000)</i>
Douglas Fir	3,465	42,804	12.35	2,274	1,184	1,527	2,263	35,556
Noble Fir	2,165	48,219	22.27	3,486	1,226	2,142	2,606	38,759
Grand Fir	393	5,777	14.70	917	400	375	261	3,824
Nordmann Fir	9	217	24.11	1	17	54	32	113
Scotch Pine	31	205	6.61	29	4	22	6	144
Other species	56	1,021	18.23	93	22	19	2	885
Total	6,119	98,243	16.06	6,800	2,853	4,139	5,170	79,281

Table 3: Acres, sales, trees sold, and average price per tree sold by county

County	Growers Surveyed ^{1/}	Acres in operations	Number of trees sold	Total sales	Average price per tree
		<i>Acres</i>	<i>(000)</i>	<i>(000) Dollars</i>	<i>Dollars</i>
Benton	31	8,140	1,273	21,656	17.01
Clackamas	189	15,200	2,201	32,360	14.70
Douglas	22	1,940	73	1,254	17.18
Lane	45	2,680	206	3,270	15.87
Lincoln	4	380	40	724	18.10
Linn	18	1,360	98	1,625	16.58
Marion	92	9,050	1,155	17,408	15.07
Multnomah	11	760	42	690	16.43
Polk	28	6,090	654	13,727	20.99
Washington	55	2,340	136	2,044	15.03
Yamhill	31	1,860	71	984	13.86
Other counties	25	1,170	170	2,501	14.71
Total	551	50,970	6,119	98,243	16.06

^{1/} This is the number of Christmas tree growers who were contacted for information, there were growers not contacted.

Table 4: Percent of Christmas trees sold by destination and specie

Destination	Douglas Fir	Noble Fir	Grand Fir	Nordmann Fir	Scotch Pine	Other Species	All Species
	<i>Percent</i>	<i>Percent</i>	<i>Percent</i>	<i>Percent</i>	<i>Percent</i>	<i>Percent</i>	<i>Percent</i>
Oregon	6	9	15	15	11	14	8
Washington	1	4	4	3	4	6	3
California	40	56	46	59	46	51	46
Other Western 1/	11	13	21	18	–	7	13
Midwest 2/	2	3	2	1	13	2	2
Gulf States 3/	12	8	7	4	2	12	10
Atlantic States 4/	8	1	2	–	12	–	5
Northeast States 5/	3	1	1	–	5	–	2
Canada 6/	2	2	1	–	7	–	2
Mexico	15	2	–	–	–	8	9
All other	–	1	1	–	–	–	--

1/ Other Western States: MT, ID, WY, NV, UT, AZ, NM, CO, AK, HI. 2/ Upper Midwest: SD, NE, KS, NM, IA, MO, WI, IL, MI, IN, OH, KY.

3/ Gulf States: OK, TX, AR, LA, TN, MS, AL. 4/ Atlantic States: MD, DE, WV, VA, NC, SC, GA, FL. 5/ Northeast States: ME, NH, VT, MA, CT, RI, NY, PA, NJ.

6/ Canada: All provinces.

Table 5: Number of trees planted by specie and year planted

Specie	1995 & earlier	1996	1997	1998	1999	2000	2001	Total
	<i>(000)</i>	<i>(000)</i>	<i>(000)</i>	<i>(000)</i>	<i>(000)</i>	<i>(000)</i>	<i>(000)</i>	<i>(000)</i>
Douglas Fir	3,592	2,904	3,524	3,095	3,263	3,600	3,213	23,191
Noble Fir	3,154	2,240	2,741	2,912	3,564	4,103	5,578	24,292
Grand Fir	550	367	358	437	409	609	722	3,452
Nordmann Fir	34	45	24	39	29	1,231	885	2,287
Scotch Pine	91	55	56	91	74	52	56	475
Other species	42	85	74	88	123	87	97	596
Total	7,463	5,696	6,777	6,662	7,462	9,682	10,551	54,293

Table 6: Oregon Christmas tree workers and wages by size of operation

Strata	1-14 Acres	15-29 Acres	30-49 Acres	50-99 Acres	100 & over Acres	Total
Full-time workers - number	11	28	8	41	594	682
Seasonal workers - number	2,509	627	696	851	3,801	8,484
Total workers - number	2,520	655	704	892	4,395	9,166
Total wages - \$ (000)	1,896	655	1,096	1,890	19,053	24,590
Annual average wage/worker dollars	752	1,000	1,557	2,119	4,335	2,683

(Continued from front)

About this Survey: The **2001 Oregon Christmas Tree Survey**, conducted in the summer of 2002, was the first-ever effort to collect accurate, detailed information for the Christmas tree industry, which traditionally has been the 6th largest agricultural commodity grown in Oregon in terms of the total value of sales. The mailing list originated from a list of growers maintained by the Oregon Agricultural Statistics Service (OASS). This list is updated each year from many sources, including the Oregon Department of Agriculture's list of licensed Christmas Tree Growers. The questionnaire content and design process began in October 2001 through discussions with the Pacific Northwest Christmas Tree Association (PNCTA). Questionnaires were mailed to a list of Christmas tree growers in January 2002, followed by another mailing in February to those that had not yet responded. Later, additional contacts were made of nonrespondents by field enumerators, and a personal letter from the State Statistician urging response was sent to selected growers. Over 90 percent of the growers contacted cooperated on the survey. However, there were some large growers among those declining to cooperate, so the amount of data unaccounted for prior to summarization was significantly larger than 10 percent. In order to have reliable survey results, estimates were made for missing reports using available information.

History: There are a number of figures floating around on the Christmas tree industry in Oregon, many of them little more than estimates and educated guesses. Currently, Oregon State University (OSU) is estimating the 2001 value of sales at \$151 million, which is based solely upon contacts with County Extension Agents. Also for 2001, the PNCTA predicted a little over 8 million trees sold with total gross sales around \$149 million. For 1997, the Census of Agriculture reported Oregon's Christmas tree sales value at \$112 million, which exceeded OSU's figure that year of \$97 million. The 1998 Census of Horticultural Specialties (growers with \$10,000 + sales) showed 7.8 million trees sold with total values of sales of \$87 million. The 2000 Nursery Crops Survey (growers with \$100,000 + sales) reported 3.8 million trees sold in 2000, with a gross sales value of 57 million. Accurate enumeration of the Christmas tree industry in Oregon is a challenging exercise due to a number of factors: 1.) the difficulty of developing a "complete" mailing list, due to the significant number of small growers who may not be licensed or show up on any available lists; 2.) the difficulty of obtaining a "farm gate" price and accounting for each Christmas tree only once; and, 3.) the general lack of support from some growers for an industry survey.

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